



City of
PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
April 15, 2021

Subcommittee Members Present: Sean Green, Krista Bailey, Wilfred Pinfeld, Kate Holmquist, Suzannah Stanley, Josh Lightpipe

City Staff Present: Matt Wickstrom, Ross Caron, Jessica Ruch, Angie Tomlinson, Melissa Linehan, Ken Ray, Brenda Fahey, Angie Thomlinson, Andy Peterson, Anna Sposito, Colleen Poole, Chris Dennis, Lisa Dennis

Agenda:

Time	Item	Presenter
1. 10:15-10:20	Introductions <ul style="list-style-type: none">• Updates• Kate Holmquist request re: Auditor's Office report	Sean/All
2. 10:20-10:45	Process Administration Questions – P&Z <ul style="list-style-type: none">• Brainstorm questions• Discuss subcommittee role	Ross
3. 10:45-10:50	March meeting notes <ul style="list-style-type: none">• Comments/corrections• Subcommittee approval	Sean/Ross
4. 10:50-11:00	ePlans update <ul style="list-style-type: none">• ProjectDox 9.2 upgrade and benefits• Questions and feedback	Angie
5. 11:00-11:10	15-minute appointments <ul style="list-style-type: none">• Project Update• Questions and feedback	Aaron
6. 11:10-11:20	Report a Problem Webpage update <ul style="list-style-type: none">• Customer contact• Questions and discussion	Colleen/Ken
7. 11:20-11:25	Collaborative documents and Subcommittee suggestion spreadsheet <ul style="list-style-type: none">• Discussion and input	Ross/Matt
8. 11:25-11:40	Portland permit metrics dashboard <ul style="list-style-type: none">• Updates since March meeting• Go-live April 16th	Andy

<p>9. 11:40-11:45</p>	<p>Next steps:</p> <ul style="list-style-type: none"> • Action Items • Items for next meeting agenda 	<p>Sean/All</p>
<p>Link to Customer Process Improvement Suggestion Form for the Commercial New Construction Permit Process.</p> <p>Link to customer suggestion form for non-Commercial New Construction suggestions</p>		

Summary of Topics Discussed:

1. Introductions, Updates and the Auditor’s Report.
 - 1.1. Sean updated the subcommittee about sharing the charter with DRAC. This item was on the April 15, 2021 agenda for today, but got pushed back to the May meeting.
 - 1.2. Sean also noted that he had introduced an amendment for DRAC to consider that would allow non-DRAC members to vote in subcommittee meetings.
 - 1.3. The group discussed the Auditor’s report that examined BDS and permitting and whether the subcommittee would like a presentation/overview of the report. Sean said that Auditor Office’s representative is available to attend the May meeting and asked if the subcommittee would like a presentation.
 - 1.4. Andy noted that there is the Commissioner’s Task Force that has been created, prior to the release of the Audit, that is looking at one of the items in the Auditor’s report – that the permitting process is too slow. The Task Force is made up of bureau directors and senior managers and four public members – Suzannah and Wilfred are both on the task force.
 - 1.5. Krista stated a preference to hear from the Task Force rather than the Auditor’s Office may be more beneficial.
 - 1.6. Andy explained that the Task Force was generated from Commissioner Ryan’s Office and the desire to look at issues that are inefficient within the permitting system and improving the permitting process. He stated that meetings will look at issues, root causes and potential solutions. He clarified that the meetings are not public meeting and that the Task Force is looking at prioritizing issues and developing a work plan to address them.
 - 1.7. Suzannah stated that the first task force meeting went well and the group split into two break-out groups for discussion. Wilfred agreed an mentioned communicating with staff from Commissioner Ryan’s Office as well as soliciting feedback from others who work in development. He said there is likely to be investment in the next month or years from developers and the federal government and that Portland cannot miss out on this investment because the permitting process is too slow.
 - 1.8. Sean posted a podcast in the chat and stated that a May agenda item should be to hear from the task force members on the subcommittee.
2. Process Administration Questions – P&Z. Ross introduced the topic of process administration questions and discussion with team supervisors. He said the goal is for a better understanding of the process and to give supervisors the opportunity to get feedback, in other words, a two-way discussion and not a presentation. Ross stated that the first team manager that was requested would be Jill Grenda from the Planning & Zoning team in Land Use Services. He noted two items of interest expressed by the subcommittee are how inconsistencies are addressed and how different review groups come in and out of the permit/land use review process. He also stated that he and Matt would share desired topics of discussion with the supervisor between subcommittee meetings, and then asked subcommittee members what questions they have for the Planning & Zoning supervisor.
 - 2.1. Sean stated that inconsistencies would be one topic as well as how work is distributed.

- 2.2. Angie said that how supervisors see their teams working with other teams to address and identify efficiencies could be a good discussion topic.
- 2.3. Krista said that understanding the team's processes such as a day in the life of a permit would be a good topic, including how reviewers gain their understanding of the process. Sean added that he'd be interested in hearing what resources and training reviewers are given.
- 2.4. Wilfred stated that it would be good to hear about why there are inconsistencies such as whether it due to different interpretations.
- 2.5. Sean said another potential topic could be whether there are experts of different permits and projects on teams such as what is the team structure and are there lead reviewers. He also stated that it would be interesting to hear how questions get resolved when reviewers are working remotely.
- 2.6. Wilfred said that it would be good to hear if a reviewer is responsible for reviewing the full submission or just parts of it, especially if details in the plans or code requirements are unclear. Sean gave an example of using photos to show an ADU would "match" a house for one permit, but then being asked to provide drawings to show the same thing for another permit.
- 2.7. Kate stated that it will be important to clarify the difference between code interpretations versus the submittal requirements, expressing the need for applicants to know what information is necessary to demonstrate compliance with requirements. She stated that issues related to making sure submittal requirements are clear may be easier to correct.
- 2.8. Ross reiterated that it will be important to maintain these topics as discussion items to minimize the need for preparation by the supervisors. He added that the process administration discussions will operate on a continual improvement basis – meaning that improvements to the discussions can be made over time.
3. March meeting notes. The subcommittee approved the meeting notes from the March 18th meeting.
4. ePlans update. Angie shared a PowerPoint about the ProjectDox 9.2 update which will be sent to the subcommittee. She said that improvements for the applicants create an easier task acceptance interface, but it will look a little different. She also said the go-live date for the updates would be May 17th. Angie noted that the update includes step-by-step instructions with "learn how" videos embedded in the application. Angie also noted that the update includes easier file uploading capabilities and that using the exact same naming convention will no longer be necessary because the update includes prompts to select the right file. Angie also noted that the update makes it easier for applicants to respond to comments from reviewers. In addition the applicant can add a view only during the initial upload and invite other professionals from their team to review.
 - 4.1. Angie mentioned some additional information including that the subcommittee can provide suggestions for future improvements and that other jurisdictions in the Portland area will start using the same upgrade soon as well and that will help with consistency across jurisdictions. She thanked the subcommittee for their input and suggestions so far and asked if there were any questions.
 - 4.2. Wilfred asked if ePlans has a structured input mechanism to outline what items are required to be submitted. Angie stated that this could be included in the task tab and noted that currently, the project team doesn't have those submittal requirements right now, noting that the submittal requirements could be included but it would only be for a small portion of project types at this point. Sean noted that there are checklists of submittal requirements available.

5. 15-minute appointments. Aaron presented the webpage for 15-minute appointments, formerly called Customer Consultations. He also thanked Michelle Schultz and Lauren Zimmerman for their help. Aaron stated that the 15-minute appointments are free virtual appointments designed to mimic consultations that previously occurred in the Development Services Center.
 - 5.1. Aaron shared the webpage to schedule appointments which can be found here: <https://www.portland.gov/bds/early-assistance/15-minute-appointments>. He explained how the webpage is set up and how to use the “book now” function. Aaron noted that most City review groups are participating, but there are a couple that aren’t yet. He also stated that the software being used in Microsoft Bookings combined with MS Teams for the virtual meeting. Aaron stated that the go-live date is scheduled for April 19th and the project team is reviewing go-live readiness of participating groups.
6. Report a Problem Webpage update. Colleen and Ken discussed the report a problem webpage which can be found here: <https://www.portland.gov/bds/development-permit-processes/report-problem>. Ken stated that problems reported using this webpage are channeled through the Customer Success team. Colleen stated she would be the coordinator of the submittals and work with the section managers. If trends of problems are apparent, those will be brought to the BDS director, including those related to Interagency bureaus.
 - 6.1. Andy noted that checksheets will have a link to the report a problem webpage so that information is readily available to customers to access.
 - 6.2. Sean asked whether the submittal is done via an email format. Colleen responded that it is currently in email format but will evolve and additional fields for providing information will be added.
 - 6.3. Suzannah asked if Colleen could return to the subcommittee with examples of problems reported, any success stories and how problems were resolved. Colleen said she can return with a later updated.
7. Collaborative documents. Ross said that BPI project and BDS staff are working on figuring out the best means to use collaborative documents. He noted that GoogleDocs is not approved by the City for archiving, but it could still be used initially; however, the document would later need to be transferred to MS Word or another format. He added that some technical issues are currently being worked out.
8. Portland permit metrics dashboard. Andy reviewed the Portland Permit Metrics webpage including a page devoted to frequently required reviews and re-reviews which will help professionals know where to focus their time. He noted that the contents are reflective of one of the issues identified within the Auditor’s report – Meeting Review Goal Time for Second Reviews. He also pointed out some data filters to help capture the information the user is looking for.
 - 8.1. Andy moved on to show for first permit review metrics which include the average number of days for reviews by different sections and by different types of permits when the first review is completed. He noted that when the first review for a certain team or type of review goes past the goal for the average number days, this could show that the goals are unrealistic, or it could show that process improvements are due.
 - 8.2. Andy also showed second review metrics, key review metrics, as well as another page showing the average number of days for applicants to respond to first checksheets.
 - 8.3. Ken noted that he will be sending out a public announcement about the Portland permit metrics dashboard and a one-pager information piece will be created.
 - 8.4. Andy noted that the BDS team is working on a tool to help users drill down to individual permits. Andy asked if there were any questions and there were none. A copy of the slideshow will be sent out to subcommittee members.
9. Nest steps. Sean asked if there were agenda items for the May meeting. Kate said she’d like to hear from the Auditor either during the next meeting or in a separate meeting.

Meeting chat:

10:34:34 From Sean Green (he/him) to Everyone : <https://lei.podbean.com/e/s2-ep-2-four-types-of->

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problems-author-art-smalley-digs-in-on-problem-solving/

10:56:37 From Angie Tomlinson to Everyone : I would like to share my powerpoint, do I have permissions to share screen?

10:56:55 From Angie Tomlinson to Everyone : Sorry, I see it now.

10:59:47 From Krista Bailey to Everyone : I have to jump to another meeting - and sorry, my camera decided to stop working for some reason! If that meeting is brief, I may try to return -- I am interested in many of today's topics! Can we get the slides from today's presentations? thanks!

11:15:45 From Brenda Fahey (BDS) to Everyone : I need to head to a different meeting. Thanks everyone

11:17:37 From Aaron Scott Merrion, BDS (he/him) to Everyone :
aaron.scottmerrion@portlandoregon.gov

11:22:52 From Ken Ray to Everyone : Report a problem website:
<https://www.portland.gov/bds/development-permit-processes/report-problem>

11:31:04 From Kate Holmquist to Everyone : Thanks, Andy, for sharing the Drac Auditor results presentation.

11:44:04 From Kate Holmquist to Everyone : This looks like great info for the committee to dive into.